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MARKETING & MEDIA
DECISIONS
SEPTEMBER 1989 • $4.00

BURNETT'S BITE

Willard Hadlock, executive vice president, media, Leo Burnett Company.

Leo Burnett Co., Chicago's enigmatic media powerhouse, is taking a chunk out of the Big Apple.

PRINT: THE QUALITY QUESTION
PACKAGE DEAL-MAKING
DIET COKE: #2 BY '92?

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MARKETING & MEDIA DECISIONS

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Media buying, Chicago style, finds its epitome in the new offices of Leo Burnett. Straight-laced, no-nonsense and powerfully effective, this very private agency is making a lot of news in media circles.

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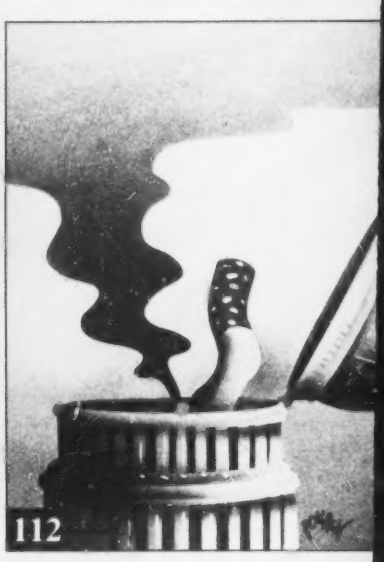

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Marketing whiz Mike Beindorff is betting that men will love diet Coke too.

DIET COKE: #2 BY '92?

by Rebecca Fannin

Mike Beindorff says it with a straight face. "Diet Coke. No. 2 by 1992."

Is Coca-Cola's vice president of marketing planning really serious? Competitors, marketing experts and beverage observers doubt it. "I think you better ask Coca-Cola if they really think that diet Coke can become the second-leading soft drink," says Emanuel Goldman, an industry analyst with Paine Webber. "It's going to be very, very tough, not easy at all. What you're talking about," he adds, "is nearly doubling the business in three years."

You're also talking about diet Coke overtaking Pepsi, which as both a company and a brand has proved itself to be a gritty, daring competitor. Yet Beindorff, a 38-year-old marketing expert who has been involved with diet Coke almost from its start seven years ago, and who moved into his current post last year, insists his now third-place drink will topple brand Pepsi — and in short order. Instead of dueling with Diet Pepsi, Beindorff has changed the rules by being the first to position a diet cola against a sugared one.

Skeptics doubt diet Coke can beat Pepsi by 1992. But Coca-Cola keeps pushing.

Diet Coke's aggressiveness can be seen in its ad campaign, which broke on this year's Super Bowl. The much-publicized spot, which used breakthrough 3-D technology, claims that of 2 million families who stopped drinking Pepsi last year, 500,000 switched to diet Coke. (Pepsi retorts that its surveys found 90% of the switchees returned to its fold, a point Coke refuses to discuss.)

Diet Coke's ad claim is controversial for other reasons as well. Many marketing experts wonder why Coca-Cola is even acknowledging the competition. "It's a lot of chest-beating," says Dave Stone, a partner at the New England Consulting Group. "For Coke, it's the latest way of saying, 'Hey, we're beating up on Pepsi.' It may work for the short term," he continues, "but a better tactic would be to find a compelling point of difference" that will make consumers want to try diet Coke.

But Coca-Cola isn't budging from its strategy. The company line is the following: Diet Coke's sales are ahead 22% this year. The soft drink already is more popular among women than

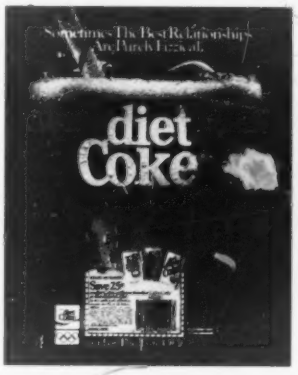
sugared Pepsi, with a 19.8 share level compared to a 17 share for Pepsi. Since the attack-Pepsi campaign began, diet Coke has captured Houston, Baton Rouge and Little Rock from Pepsi. Further, the share for diet Coke is up by three points to 14% of the total market. Pepsi's share is down by 0.5% to 18.6. Plus, diet Coke is within 2.6 points of fountain Pepsi.

The picture looks equally good when only food-store sales are measured. According to *Beverage Digest*, Pepsi's market share had declined by more than 2% as of May 1989 compared to a year earlier, while diet Coke's has climbed by 10%.

Still, the skeptics wonder just how realistic the diet Coke objective is. They point out that diet Coke's 11% share of food-store sales is far behind Pepsi's at 16.7%. Beindorff and company answer that diet colas are gaining an increasing share of the total market at the expense of sugared colas, which means the low-calorie segment is picking up more shelf space. While diet colas grew by 6.6% from May 1988 to a year later, sugared colas' share slid by 1.5%. As the baby-boom generation ages and becomes more concerned about trim waistlines, the word among marketers is that this same trend line can only continue.

Certainly, Beindorff and his ad agency, Lintas:USA, aren't shy about their aspirations for diet Coke. At a recent meeting of the Ad Club of New York, Beindorff and two Lintas execs pretended they were on the war front (the cola one). Wearing combat helmets and bandages, they wrote letters home to sweethearts, mothers and wives describing the diet Coke action. Beindorff read aloud a letter he had written mom telling how the diet Coke campaign is being received at Pepsi headquarters. "The enemy has denounced us to the press as crazy. How could a diet soft drink ever overtake regular Pepsi? To quote from the enemy's propaganda leaflets," Beindorff said, Pepsi believes "there's not a snowball's chance in hell of that happening . . . they're breathing their own exhaust fumes." As for Pepsi's view of what Coke will accomplish: "It's not a matter of diet Coke becoming the number-two soft drink. It's a matter of diet Coke becoming the number-two diet soft drink."

Certainly, Coca-Cola has another goal in mind. During the first quarter this year, Coke spent $27 million on the diet drink, about half of the entire budget for last year, $55 million.



Lintas exec Stone Roberts is determined to help diet Coke achieve its ambitious goal. Tools are lots of coupons and ads directed especially to men.

(Pepsi claims Coke spent $40 million in that period.) The spending level for the first three months of 1989 was also nearly triple that of Coca-Cola Classic, the flagship brand.

Media selections have been highly visible ones too — the Academy Awards, the American Music Awards, the NFL and Wimbledom, according to Dave Platt, senior vice president and manager of media planning at Lintas. A major print campaign has been in place as well, targeting specific audiences. Heavy promotions haven't been skipped over either. More than 200 million coupons were dropped during the first quarter, sweepstakes with free cruises have been offered, and an unusual sampling program has been in place at supermarkets. Under one program developed by Coke New York, vice president of marketing Tom Foristel says whenever the cash register rings up a Pepsi sale, a coupon dispensing machine is triggered. It offers a free diet Coke to the Pepsi drinker.

"I think we caught them [Pepsi-Cola] off guard in a number of places," says Stone Roberts, executive vice president and director of client services at Lintas. Ironically, the campaign originated in response to a Diet Pepsi taste challenge to diet Coke last summer. At that time, Diet Pepsi — with Mike Tyson in tow as a spokesperson — was touting its superior taste. When Coca-Cola objected, citing research to the contrary, Pepsi pulled the ads. Yet the diet Coke brand was left needing something to control the damage.

If Coca-Cola had counterattacked Diet Pepsi, Beindorff explained, the brand would have lost by being on the same battlefield. If they failed to respond, it would seem like they couldn't dispute the claim. So Coke "went after their big gun," said Beindorff, instead of "trading shots with Diet Pepsi."

"It's an idea that's been discussed for a long period of time, and we agreed that the opportunity was 1989," says Roberts, adding that it was one way that Coke could respond to Pepsi's Mike Tyson punch.

Some interpret the campaign as a way to continue diet Coke's momentum rather than a serious threat to Pepsi. "A man's reach should exceed his grasp," quotes Henry Schimberg, president and COO of Johnston Coca-Cola Bottling Group, Coke's second-largest bottler. "I think the campaign is to maintain the momentum of diet Coke and to maintain its lead of the diet-cola segment," says Schimberg. He also points out by talking about surpassing Pepsi, the diet Coke strategy reinforces Coke Classic as the leading soft drink.

Pepsi-Cola, naturally enough, is trying to get the momentum back on its side. As expected, Pepsi is trying to return the battle to one between the diet drinks. Diet Pepsi holds a 7.6 share of the market, compared to diet Coke's

11% stake. "Although diet Coke's base is larger, over the last three years the growth rate of Diet Pepsi has been faster than that of diet Coke," claims Bill Katz, senior vice president and management representative at BBDO, Pepsi's agency. He notes that Diet Pepsi's volume has grown by 16.5% from 1985 to 1988, while diet Coke is up 11.8% during the same period.

The company also cites Diet Pepsi's food-store sales growth this year: Diet Pepsi's share climbed to 7.6% by May 1989, a gain of 8.6%. Still, diet Coke moved ahead to a 11 point share from a 10 share during the same time, according to *Beverage Digest*.

Pepsi has reacted swiftly to the diet Coke challenge in other ways. In a significant move, Pepsi successfully questioned Coke's claims about the number of people switching to diet Coke. The diet Coke commercials have since been revised. Instead of citing specific figures to describe the brand switching, recent spots note that the "move is on" to diet Coke.

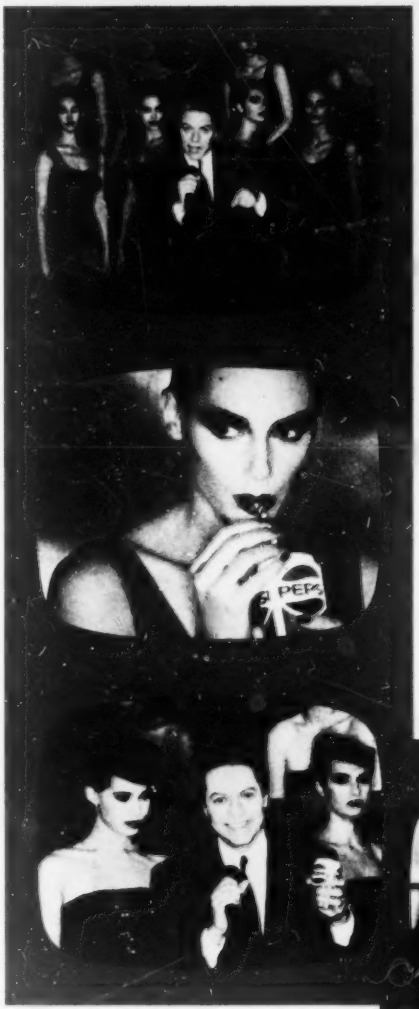
Pepsi also has responded with its own set of commercials for Diet Pepsi. The initial spots spoofed diet Coke's 3-D spots and poked fun at how the company believed that Coke came up with its figures. It shows a researcher wearing 3-D glasses.

Drawing more ammunition, recent Diet Pepsi commercials ask viewers to switch from diet Coke to "the right one" and to the one "taste that's generations ahead." The Diet Pepsi ads, which feature actor Michael J. Fox, also play on diet Coke's campaign with the tag, "The real move is on to Diet Pepsi." Like Coke, Pepsi favors premiere events to break campaigns. The heavy television spender is a big supporter of the Super Bowl broadcasts. In addition, this year Diet Pepsi sponsored a talent show using NFL players during the pre-game Super Bowl show. It was somewhat of a coup, because Coca-Cola has had exclusive soft-drink advertising and promotion rights with the NFL.

Meanwhile, in the continuing cola war, BBDO's Katz is downplaying diet Coke's results this year. "Diet Coke is gaining share because they are buying it," charges Katz. He points out that Coke's aggressive pricing, promotion and couponing policies are only leading to short-term volume gains. "There's been no change in consumer attitudes toward diet Coke," says Katz, citing Pepsi research. "The product attributes have remained flat and consumers' first choice preference hasn't changed." He adds that of the 500,000 who switched to diet Coke last year, 90% didn't repurchase it — a point Coca-Cola is mum on.

Though Pepsi may be trying hard to keep the battle focused between the two diet drinks, Coke is continuing to develop a strategy that heightens the stakes. Diet Coke is striving to convince males that drinking a diet cola is just fine. About 35% of diet soft-drink consumption is now male, according to *Beverage Digest*, a 130% increase from five years ago.

Given that diet Coke has always been positioned as a good-tasting



BBDO's Katz enlists a rock star and teen idol to make Pepsi's sugared and diet drinks seem irresistible.

(not just low-calorie) drink, Coke is at an advantage. "One of the reasons that diet Coke has been so successful," says Henry Hersh, president of Pepcom Industries, a Pepsi bottler, "is that it didn't have a carryover image. Diet Pepsi has been around 23-24 years, and it has gone through reformulation time and time again, including the cyclamate ban. Yet diet Coke was new. What was most important is that they went for the good taste of it, not just lowered calories."

THE SHARE RACE

Major brand 1989 food-store shares through May.

Brand	Share	% Change
Pepsi	16.7	- 2.3
Coke Classic	14.2	+ 7.5
diet Coke	11.0	+10.0
Diet Pepsi	7.6	+ 8.6

Source: Beverage Digest. Food-store sales only; includes caffeine free lines.

To attract males, diet Coke spots feature tough-looking men picking the drink over Pepsi. In one case, it's a Pepsi truck driver who, when confronted with both Pepsi and diet Coke vending machines, picks two diet Cokes for the road. Coke also has recruited hockey star Wayne Gretsky and former Pepsi endorser Don Johnson for diet Coke's male drive.

In addition, in April, diet Coke ran full-page ads in *USA Today* intended to reach men. The ads point out that diet Coke has overtaken Pepsi to become number two among women. A 25¢ coupon is offered with the promise, "Today women, tomorrow mankind."

Media choices reflect the diet Coke emphasis on the male target. While Lintas is still planning diet Coke's 1990 media schedule (McCann-Erickson buys media for diet Coke), the plan will likely include the showcase media spots that have been favored for the brand. For instance, there's sponsorship of the Super Bowl and spots during the National Football League playoff games.

A heavy emphasis on print should continue as well. "We've always been a big believer in print for diet Coke," says Platt at Lintas. "We use it in the customary ways — to support broadcast and to drop coupons. It also provides additional punch for diet Coke against specific targets, and that is important for a brand that needs to be built." Platt notes that three magazines are specifically selected to reach men: *Sports Illustrated*, *Sport* and *Inside Sports*. Diet Coke also runs ads in *Rolling Stone*, *People*, *Glamour* and *Cosmopolitan*. In addition, diet Coke is advertised in Black magazines.

Network television is purchased with the goal of reaching the highest numbers of people. The new diet Coke spot taking on Pepsi, for example, used four roadblocks (commercials running at the same time on different channels) during January. "The strategy allows you to dominate a particular period of time, and that's what you need when you're trying to steal march on the competition," comments Platt.

Diet Coke's media choices include several tv specials for high visibility.

Lintas is also a supporter of cable as part of the overall tv network buy. Diet Coke ads are purchased on MTV, ESPN and TBS. In addition, Coke bottlers purchase on a co-op basis spot tv and radio, newspapers and outdoor.

As part of the goal, look for diet Coke to play up an edge in fountain sales, which account for about one-third of total sales in the soft-drink business. Coca-Cola has about 60% of the fountain business, while Pepsi has 26%. However, Coke, which already counts McDonald's as a major customer, recently lost out when Burger King reviewed how Pepsi was servicing its account and kept the drink on, despite ferocious lobbying by Coke. However, the Burger King-Pepsi contract remains open-ended, with a termination option lasting up until mid-September. According to *Beverage Digest*, expect Coke to increase heat on Pepsi's fountain business and for Coke to even woo Pepsico-owned restaurants, Kentucky Fried Chicken, Taco Bell and Pizza Hut.

Coke isn't forgetting the important bottler system in diet Coke's drive to surpass Pepsi. In fact, some observers believe that the current campaign places a priority on bottlers. "I think the comparison they're trying to make is confusing consumers," says Larry Jabbonsky, associate editor at *Beverage Digest*. "It's a way to rally the troops and then the trade. The average consumer doesn't relate to the number claims they're making," he adds.

Coke, of course, disagrees. All of the directional data, says the company, proves it is on the right track. "For as long as one man or one woman still remains in this great land of ours who has not tried diet Coke, then we must fight on to victory," says Beindorff. And with an attitude like that, and a tough competitor like Pepsi, it's obvious there will be no truce soon. ■

THE AD RACE

Advertising expenditures by major brands.

Brand	1988	First quarter, 1989
Pepsi	$ 63,865.1	$17,384.1
Coke Classic	68,304.6	10,955.1
diet Coke	55,507.3	27,358.1
Diet Pepsi	48,469.3	19,404.5

Source: Arbitron's Broadcast Advertisers Reports. Leading National Advertisers. Includes caffeine free lines.

BRAND REPORT

No. 164: Point-and-Shoot Cameras

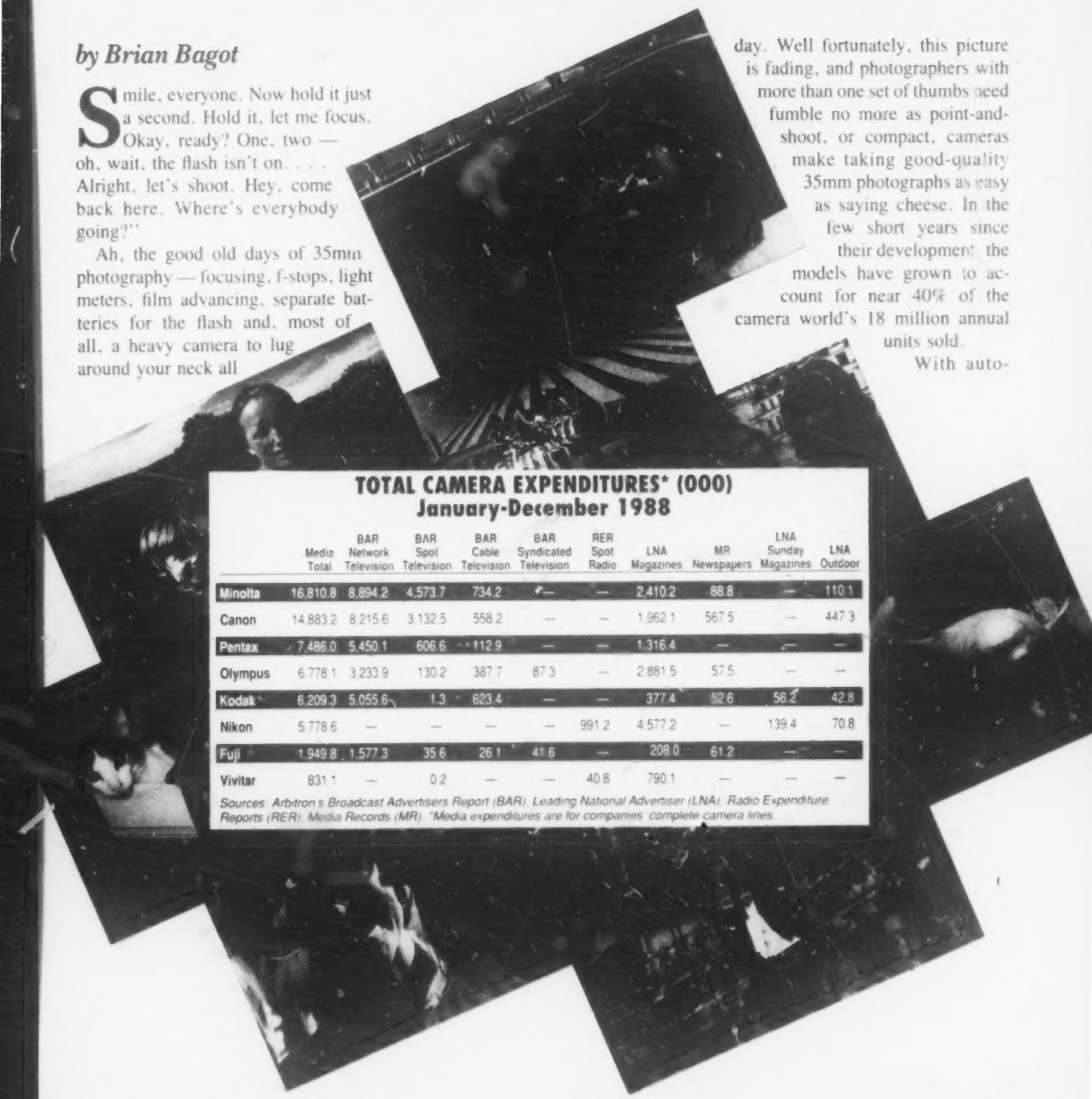
FOCUS POCUS

by Brian Bagot

Smile, everyone. Now hold it just a second. Hold it, let me focus. Okay, ready? One, two — oh, wait, the flash isn't on. . . . Alright, let's shoot. Hey, come back here. Where's everybody going?"

Ah, the good old days of 35mm photography — focusing, f-stops, light meters, film advancing, separate batteries for the flash and, most of all, a heavy camera to lug around your neck all day. Well fortunately, this picture is fading, and photographers with more than one set of thumbs need fumble no more as point-and-shoot, or compact, cameras make taking good-quality 35mm photographs as easy as saying cheese. In the few short years since their development the models have grown to account for near 40% of the camera world's 18 million annual units sold.

With auto-



TOTAL CAMERA EXPENDITURES* (000)
January-December 1988

	Media Total	BAR Network Television	BAR Spot Television	BAR Cable Television	BAR Syndicated Television	RER Spot Radio	LNA Magazines	MR Newspapers	LNA Sunday Magazines	LNA Outdoor
Minolta	16,810.8	8,894.2	4,573.7	734.2	—	—	2,410.2	88.8	—	110.1
Canon	14,883.2	8,215.6	3,132.5	558.2	—	—	1,962.1	567.5	—	447.3
Pentax	7,486.0	5,450.1	606.6	112.9	—	—	1,316.4	—	—	—
Olympus	6,778.1	3,233.9	130.2	387.7	87.3	—	2,881.5	57.5	—	—
Kodak	6,209.3	5,055.6	1.3	623.4	—	—	377.4	52.6	56.2	42.8
Nikon	5,778.6	—	—	—	—	991.2	4,577.2	—	139.4	70.8
Fuji	1,949.8	1,577.3	35.6	26.1	41.6	—	208.0	61.2	—	—
Vivitar	831.1	—	0.2	—	—	40.8	790.1	—	—	—

*Sources: Arbitron's Broadcast Advertisers Report (BAR); Leading National Advertiser (LNA); Radio Expenditure Reports (RER); Media Records (MR). *Media expenditures are for companies' complete camera lines.*

loading, auto-advance, auto-focus, auto-exposure and a host of other autos, "you don't have to be a technical whiz at all" to enjoy 35mm photography, notes Barry Harrand, director of marketing research for the Photo Marketing Association.

Not only are the manufacturers making the cameras easy to use — all you have to do is literally point and shoot — they're making them so just about anyone can get into the picture. List prices can range from $59.59 for Kodak's basic fixed-focus S100EF to $529.95 for Chinon's Genesis, which is a highly advanced point-and-shoot, featuring auto-focus and a zoom lens. In between, there are a plethora of models sporting combinations of features like dual lenses for standard and telephoto shots, various focus ranges and accessories that will appeal to shutterbugs in all budgets.

So with hitting the niche the name of the game, this wide span of prices allows manufacturers to zoom in on different segments of the 25-to-54-year-old group earning $25,000 and up. The male/female split is about 50/50. There are point-and-shoots for beginning photographers, water-resistant models for users with active lifestyles and top of the line, multi-feature models for current compact owners to trade up to or for serious amateurs looking for a second camera.

"We know we're going to sell various types of products in specific market areas," explains Jim deMerlier, vice president of marketing for the photographic division of Minolta, generally considered to be the leader in the category. "We know that the inexpensive cameras are going to sell better in drug stores and discount outlets, whereas the zoom-type camera does very well in specialty stores."

Television and print were the primary advertising vehicles used to help sell between 7 million and 8 million point-and-shoot cameras last year, with programing and titles tending to have the largest common denominator — consumers in the demo who want to take good pictures with a minimum amount of effort.

Highly rated prime-time shows, such as *Cosby* and *The Golden Girls*, and general-interest magazines, such as *Life*, *Time* and *Good Housekeeping*,

Kodak is tapping into mainstream America with its S Series.

tended to receive the bulk of the ad dollars. Some companies, like Olympus, also use niche books like *Parents* and *Travel & Leisure*. Photo-buff books are rarely used, except by Canon, since serious amateurs and professionals tend to be primarily interested in single-lens reflex models. These intimidating cameras, with dials, gauges, manual focus and interchangeable lenses, are what most people think of when it comes to 35mm photography.

As expected, many of the companies make a big push during the fourth quarter and buy time on Christmas specials, like Kodak and its slot on *Rudolph the Red-Nosed Reindeer*.

With market-share information in the photographic industry a better kept secret than some Pentagon reports, companies are unwilling to divulge any figures, and industry watchers are unable to provide an objective ranking. However, one source, citing internal figures, says Kodak, with 29%, was the unit-volume leader last year in the 35mm automatic non-SLR camera business, thanks to a strong position in the mass-market, low end of the category. Kodak is followed by Minolta, the leader in the upper-end, with 11%, and Canon and Vivitar, each of which had 10% in 1988.

Most of the volume is in the under $100 actual-retail category. But it's the $150-$250 mid-range, featuring telewide and zoom lenses, that offers a variety of shooting options and hits the broadest buying group, while the $250-and-up segment lets users get more creative and override some of the auto features for special effects.

Whatever the price, though, industry watchers agree that all the cameras provide quality photographs, far superior to 110, 126, discs and instants. As Harrand puts it, "Certainly the fact is, not only are the cameras very easy to use, but they are also exceptionally good quality. These are probably the two factors most important in acceptance of the product by the consumer." They are, in fact, so accepted that they made up an estimated 40% of the 18 million cameras sold last year and 80% of the entire 35mm market.

With the market becoming highly competitive, there are more than 150 models out there, and with growth at about 10% annually, down from 30% several years ago, price promotions at the retail level are another method used to frame sales. Depending on how high the list price is, cameras can be marked down in some cases by $200. For instance, Chinon's Genesis has a manufacturer's suggested retail price of $529.95, but actual retail runs anywhere from $299 to $339.

Not only are the cameras easy to use; they also offer excellent quality.

Such discounting "is common practice in the photographic industry," says Ken Gerb, vice president of specialty dealer sales for Chinon. "We have a suggested retail, which is a published price, and each marketplace will then discount thereafter."

Adds Harold Martin, editor of *The Wolfman Report*, a statistical report on the photographic industry published by *Popular Photography*, "It's an extremely competitive market. It's primarily price competition. You've got a model in line, like Chinon and Ricoh, at every $30 price point."

In addition, camera kits have been developed to create added value. These include accoutrements like a camera case, lens tissues, film and batteries. Most are done regionally in an effort to bolster sales in photographic specialty stores, which are being hit rather hard, with department stores, mass merchants, drug stores and catalogue showrooms making up about 80% of sales, according to James Chung, director of financial relations at Fuji.

Also coming on the scene are bridge, or new-concept, cameras that are a hybrid point-and-shoot and SLR, which basically makes them autofocus SLRs without interchangeable lenses.

And making their way into the 35mm, point-and-shoot category are single-use, disposable cameras from Kodak and Fuji that sell between $5 and $10. Basically just a 35mm box camera that provides decent quality photographs outdoors, they come in handy if users don't want to take their more expensive cameras to the beach or if the camera is inadvertently left behind on the way to the theme park.

Following is a clear picture of how the leaders in the point-and-shoot category are advancing in a tough market.

Eastman Kodak

Known as a leader in film sales, as well as for its 110 and 126 instamatics and disc cameras, Eastman Kodak is also the volume leader in the 35mm automatic non-SLR camera market, with most of its strength in the low to upper-middle point-and-shoot segment. Kodak units accounted for 29% of the point-and-shoot market in 1988, according to one source. Its point-and-shoot line runs the gamut from a $10 single-use camera to a fully featured 16-zone auto-focus non-SLR listing for more than $250.

With its S Series, Kodak is looking to tap into "mainstream America, adults 18-49, with income of $25,000 or more" and is placing the main emphasis on "picture quality first and ease of use second," according to Kathleen Moran, director of marketing and communications, camera products, in the consumer imaging division of Eastman Kodak. "We are primarily targeting cartridge and disc users, those who are interested in entering the 35mm market, as opposed to SLR users, who are looking for a second camera."

The marketing and advertising plans are not varied for the cameras in different price points, but the ad campaign from Young & Rubicam does highlight only the fully featured models in the line, like the S500 and S900, in print. However, the S Series as a line of cameras is supported on tv.

According to LNA, almost $500,000 was spent on magazines last year that included *Life, People, Parents, Reader's Digest, Sports Illustrated* and *Good Housekeeping*. In tv, where about $7 million was invested in the second and fourth quarter, the plan was to "get the reach and then go into cable with frequency," says Moran. Broadcast network flights included the Academy Awards show, family programs like *Cosby* and seasonal specials, including *Rudolph*.

But the line is in the highly competitive and active price range, and that's where the name Kodak comes in. When it comes down to choosing between Kodak's S500 and Minolta's Freedom 200, a camera with similar features, "the thing that would carry us is the brand name," states Gaetan Leambiase, marketing planning specialist for Eastman Kodak for 35mm cameras. "If you took a product feature for feature, style for style, the big tie-breaker is the brand name."

Minolta

Noticing that most of the activity in the point-and-shoot market is at the $150 price point and below, Minolta is attempting to expand from the upper end and tap into more segments of the category with the introduction of five Freedom cameras last June, according to Jim deMerlier, vice president of marketing for the photographic division. The least expensive entry is the Freedom 50, a fixed-focus, entry-level camera that lists for $91, but will retail in the $60 range.

Since the line of its Freedom cameras crosses the broad demo of active 25-50-year-olds with incomes of $25,000 plus, Minolta is using tv and a long list of general-interest publications, as well as some more targeted books, to get more people behind the lenses of its point-and-shoots. Titles include *People, Life, Modern Maturity* and *Golf Digest*.

Minolta is expanding from the high to the mid-priced segment.

In tv, not much prime time is used, according to Andrea Ostrowski, account executive with Campbell-Mithun-Esty, which is handling creative and media buys for Minolta. Most of the flights run during news, late fringe and sports. Daytime is not used because "it's really not for our target audience," Ostrowski states. "The people we want are more likely than not to be working," she points out. "They're out doing things, not sitting home watching tv."

Out of the $16.8 million Leading National Advertisers estimates Minolta invested in camera advertising last year, the Freedom line received the bulk. But even though the line is made up of nine cameras, it's the "newest, most technologically advanced models" that are highlighted in ads, according to Rena Brover, marketing services analyst with Minolta. These include the top-of-the-line Freedom

Feature for feature, model by model, the brand name is the tie-breaker.

Zoom 90 and the waterproof Weathermatic Dual 35 that list for $428 and $303, respectively.

Minolta is currently considered the leader in the high-end 35mm camera business, but it had an 11% share of the point-and-shoot market last year.

Canon

Unlike others in the category, Canon is advertising its Sure Shot line of point-and-shoots in a comprehensive list of photo-buff books, such as *Popular Photography*, and is taking aim at enthusiasts.

As Jeff Levine, vice president, group management supervisor for Grey Advertising, Canon's agency, says, "These point-and-shoot products make an excellent second camera." He points out that features such as Canon's tele-converter on the Sure Shot Multi Tele, which can shoot one-half of a frame at a time, really strikes a creative nerve with hobbyists.

In general, however, the Sure Shot is a mass-product line, skewed at a broad range of adults and hitting the mid to upper-end price ranges. This is reflected in a media schedule that consists of general-interest print, including *Life* and *People*, as well as morning news shows, prime time and late night.

Although he would not comment on future plans, Levine says that in the past the Sure Shot Supreme and Sure Shot Multi Tele, with respective list prices of $328 and $399, have received both tv and print support, while the recently introduced, top-of-the-line Sure Shot Zoom XL was rolled out with print. The ad execution uses two two-thirds fractionals on facing pages that run up the outside columns, with editorial in the middle.

With its fixed focus Snappy S model, listing for $137 and not a part of the Sure Shot line, Canon is targeting primarily a younger female demo. Because of its more youthful appeal, ads for Snappy S have aired on programs such as *Friday Night Videos*, as well as on *Today* and *Good Morning America*. The print campaign has run the gamut of general-interest, wide circulation magazines. And with the signature — "So advanced, it's a lot of Canon for a little money" — the ads have a totally different feel than Sure Shot advertising, which touts, "So advanced, every shot's a sure shot."

LNA pegs Canon's total 35mm camera advertising at about $15 million last year, with almost $12 million going to tv, while magazines picked up about $2 million. It's market share of the 35mm point-and-shoot business last year is figured to be 10%.

Canon uses two two-third-page ads in a spread for its Sure Shot Zoom XL.

Vivitar

With full-page ads running in *People* and *Life*, Vivitar is targeting everyone, according to Gary Davis, executive vice president of operations at Vivitar. "We go out after everybody. It could be a second camera for somebody who's interested in photography or the prime camera for anybody who just needs a camera to take pictures of graduations, weddings, vacations, things of that nature," he explains.

In addition to the mass circulation books, the upper-end customer is reached through *American Heritage* and *Smithsonian* magazines. LNA pegs Vivitar's 35mm camera magazine expenditures last year at $790,100.

Using primarily print, Vivitar goes after a wide demo.

Television is not used because of its cost, according to Davis. "It's incredibly expensive, and unless you're willing to put millions into television, I just don't think it brings the return. With print we can get specific demographics."

Since no model-specific advertising is done, the general message of the campaign from Manhattan Communications, Manhattan Beach, Calif., is camera quality, popularity and a feature for just about every budget. The line cuts across all price ranges, starting with the PS:120 that lists for $80, right up to the $300 model 2001. "We just go out and tell everybody that we've got what they need. Depending on whatever price point they want to pay, we've got something there," adds Davis.

In addition to making sure almost everyone can afford a Vivitar point-and-shoot, the company's retail placement assures that everyone can get one, as well as giving it about 10% of the 35mm automatic non-SLR camera business in 1988. The majority of the business is in the national chains like Sears, J.C. Penney and Montgomery Ward, as well as regionals like Wal-Mart, K mart and Target.

"My philosophy is that anyplace that has a roof to keep the rain off the equipment and has a cash register is a

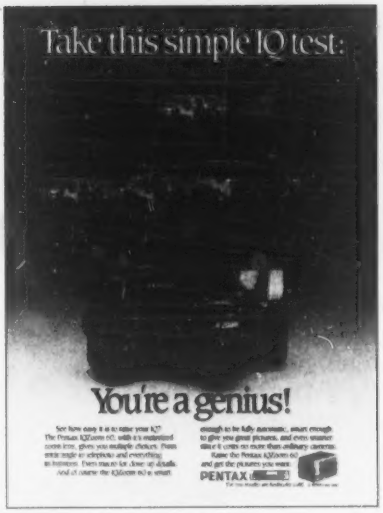
potential place to sell cameras," stresses Davis.

Pentax

Pentax, which spent $7.5 million on advertising its entire camera line last year, has stuck with one philosophy — as the cameras have gotten more sophisticated, the consumer is still looking for simple products.

"So there are really two schools of thought when you approach advertising in this category. One is to attempt to dazzle the user with features," explains Chas H. Conklin, vice president, management supervisor on Pentax business for the Bloom Agency. "We've found this does one thing — confuse them. We've tried to keep our message extremely simple."

Conklin cites the introduction of the IQ Zoom in '87 the first zoom in the category. "We invented a disease that only Pentax could cure, and that was the concept of the human zoom," he says. For two years, people in the ads have been running fore and aft to frame their shots, illustrating a problem that's solved by the Pentax IQ Zoom. "It was very easy to understand and a problem people could relate to," says Conklin. "We didn't attempt to go back and educate the category on what a zoom does. We took it more on an end-result basis."



Pentax keeps its IQ Zoom message simple.

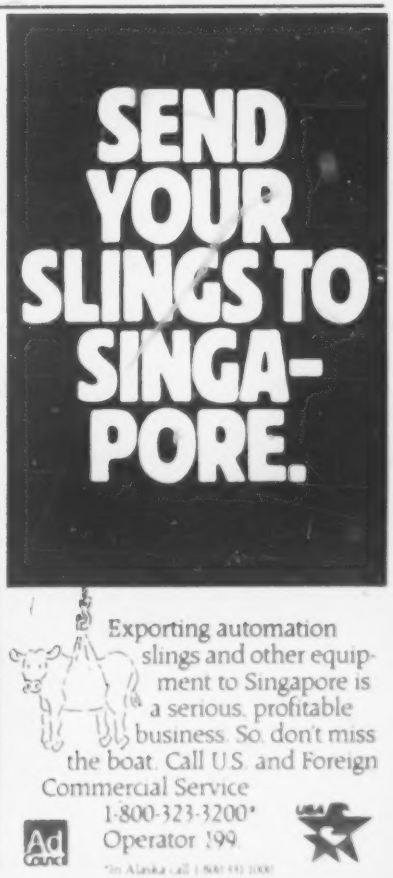
Keeping the message as user friendly as possible, Pentax, with 7% of the units in the 35mm automatic non-SLR market in '88, launched the brand initially on tv, which included prime time broadcast and cable, as a logical corollary to their mass-market distribution. This year, it's been supplemented with some broad-based print, including *People*, *Sports Illustrated* and *Life*. About $1.3 million was spent in magazines last year for the complete line.

With a camera in each different price group of the zoom segment, which is starting to get crowded with about 20 competing models, the strategy does not call for varying the marketing plan for each, but rather to bring one Pentax IQ Zoom message to the marketplace, according to Conklin. Its IQ Zoom 60, IQ Zoom 700, IQ Zoom 900 are about $40 to $50 apart on an actual purchase price basis, starting with the 60 at about $180.

Nikon

Some would think that being a leader in the professional camera segment would make it easy to just sit back and depend on that reputation when mar-

WHY GO THROUGH THIS?
YOU COULD LEARN A LOT FROM A DUMMY. BUCKLE YOUR SAFETY BELT.
A Public Service Message
Ad Council
U.S. Department of Transportation


SEND YOUR SLINGS TO SINGA-PORE.
Exporting automation slings and other equipment to Singapore is a serious, profitable business. So, don't miss the boat. Call U.S. and Foreign Commercial Service
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Operator 199
Ad Council
USA

Nikon uses humor to explain the features of its cameras.

keting a line of point-and-shoots. But Bill Giordano, marketing manager for Nikon, says it's a double-edged sword. "The name Nikon usually conjures up a professional camera, so people think the camera is going to be complicated and expensive," he says. "These cameras are easy to use and modestly priced."

With four point-and-shoots spread across the high-mid to upper price points, the company had 5% of the market last year and is currently targeting an even split of males and females of all ages.

Ads from Scali, McCabe, Sloves run in the full complement of mass reach books, such as *People*, *Life* and *Time*. For tv, the fall schedule is in the works, but in the past, prime time, late night and some of the morning news programs have been used, as well as some Super Bowl spots.

The Nikon line of point-and-shoots opens with a list price of $210 for the One-Touch 100 and tops off with the Zoom-Touch 500 at $404. In the middle ground at $275 list is the Tele-Touch 300, a dual-lens camera that has a red-eye reduction feature in which the flash fires twice for a picture. The first flash closes the pupils of your subject's eyes, and the second, three-quarters of a second later, takes the picture.

Although the cut-throat competition is in the lower end of the business, Giordano says it's also tough at this level with Canon, Olympus, Minolta and Pentax in the fray. He adds that Kodak is in there with wide distribution and strong brand recognition. To help sway consumers, Nikon spent a total of around $6 million to push its entire camera line, with close to $5 million in magazines, according to LNA.

Olympus

With much of its competition still very active in the SLR category, Olympus has concentrated on the point-and-shoot market, building its Infinity line to eight cameras that run a wide range of price points and gave the company 5% of the 35mm point-and-shoot units last year. Actual retail prices start at $60 for the TripMD and reach $350 for the Super Zoom 300. "We've really concentrated in this area and think we have all the major price and feature points covered with that lineup," says David Willard, senior vice president of marketing for Olympus Corp., consumer products group.

The target is that broad 25-54-year-old, higher income group. For the lower-priced cameras, the income level may be $30,000 plus, but on the Super Zoom Olympus, it is looking at $40,000 plus or more. And since the demo is so wide, tv and mass-circulation print ads from Lowe Marschalk make up most of the advertising mix. Olympus spent almost $7 million for its entire camera line last year, according to LNA.

"We're using television for broad exposure and to help overall brand awareness, but there are some targeted segments," explains Willard. "The majority of the usage is family and travel, so of course we're in those books." Titles include *American Baby*, *Travel & Leisure* and *European Travel & Life*. Some mass-market titles used are *Time*, *Newsweek*, *Sports Illustrated* and *National Geographic*.

Olympus targets the upper end with its Infinity Twin.

Right now the push is on the Infinity Twin and Super Zoom. The upper-end Super Zoom's exposure during the spring and fall was tv and print that created a unique, high-tech image. For the Infinity Twin, which retails in the $200 range, a humorous 15-second tv spot goes through the features of the camera to show that it's compact and easy to use. The print campaign also reflects that message. Network programing for both cameras included prime time, big-rating shows such as *Golden Girls*, *20/20* and *Cosby*, as well as *Nightline* and morning news shows. Cable was also used.

In addition, the line is heavily advertised during the Christmas season. Television specials are used from time to time, says Willard, but the most consistent run has been the Macy's Thanksgiving Day Parade.

Promotions are also used by Olympus. For mass merchants, camera kits are put together that include the case, batteries and lens cleaners, while for specialty dealers who require higher profit margins, the company offers date cameras with a quartz clock built in that can put the date and/or time on the film. This, says Willard, is more popular in Japan than in the U.S., but for the specialty dealer, it's an extra feature they can sell.

Fuji

Just in the market about six years, Fuji is out trying to make its Discovery line of compact 35s a household name. It's also making it clear that they're a serious contender in the camera market. "You'll see us developing the Fuji Discovery name very aggressively over the next five years," stresses Rod King, senior marketing manager of Fuji Photo Film USA. Fuji had a 5% share of the 35mm point-and-shoot market last year.

In its efforts to increase awareness, Fuji has foregone print and relied primarily on tv to get its message across.

Fuji shows that it's easier to drop-in load than to remove the film from the box.

Programing includes Sunday night movies, *Knots Landing* and other network prime time, late night and dayparts, as well as cable's A&E, ESPN, VH1 and MTV.

The company thinks that with the broad reach of tv, it can dramatically increase consumer awareness and then move to print. "Once we get our target awareness levels, then we will start getting more specific with higher-end models in print," explains King. "We want to get up to a 95%-97% awareness before we start print." This is expected to be later this year.

Fuji is targeting 18-49-year-old, male heavy-users with its Discovery line, starting with the 160 that carries a suggested retail price of $199.95 and moving all the way up to the Discovery 2000 Zoom at $519.95. But for the focus-free segment, like the FZ-5, DL-7 and DL-15, all of which are under $100, the target is skewed more toward females and a broader youth market, according to King. Citing Fuji research, he says that over the years men have been the primary purchasers of SLRs and high-end cameras, by as much as 75% to 80%. But he points out that this is "changing dramatically as more women get into photography."

Noting the anxiety that's caused by 35mm camera loading, the focus of the tv spot from Hal Riney & Partners is on Fuji's drop-in loading system. The spot features a young girl who is able to load the camera faster than she can take the film out of its box.

According to LNA, Fuji invested a total of $1.9 million in advertising last year, $1.7 million of which was in tv.

In the single-use category, Fuji's Quick Snap business is growing faster than expected. The disposable is advertised with film, mainly in free-standing inserts and point-of-purchase. Currently, there are no specific Quick Snap ads, but as the category grows, King says the product "will probably hit the tube." ■

PRESERVATION PLAN ON IT

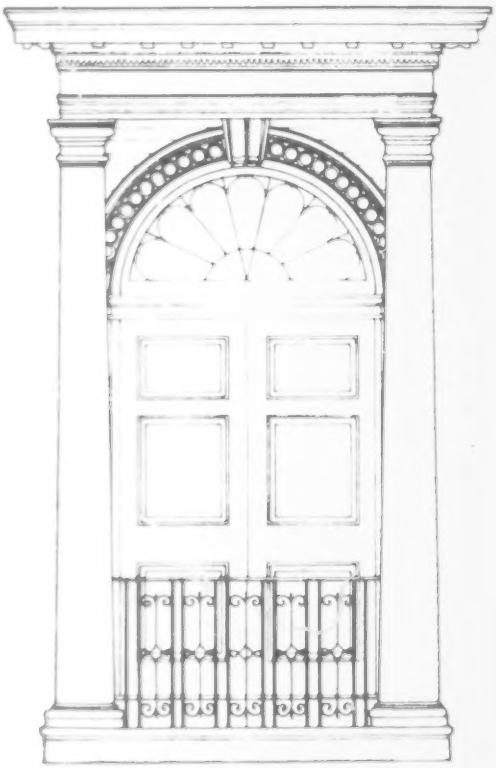
Planning on restoring a house, saving a landmark, reviving your neighborhood?

Gain a wealth of experience and help preserve our historic and architectural heritage. Join the National Trust for Historic Preservation.

Make preservation a blueprint for the future.

Write.

National Trust for Historic Preservation
Department PA
1785 Massachusetts Ave., N.W.
Washington, D.C. 20036



SALES PROMOTION

by Russ Bowman

COUPONS KEEP THEIR CROWN

Among the major tools and techniques of promotional marketing, coupons remain the ongoing winner. According to Donnelley Marketing's 1988 Survey of Promotional Practices, 92% of consumer product marketers use coupons in some shape or form. Only cash refunds are a close second, with 85%.

Depending on who you listen to, however, coupons' glittering performance may be taking on a bit of tarnish. Manufacturers Coupon Control Center (Mc3) shows couponing growth in 1988 at only 3% over the previous year, with 221.7 billion coupons distributed. This compares to 6%, 13% and 10% growth in 1987, '86 and '85, respectively. In fact, 3% is the lowest growth in this decade.

Maxwell House matched coupons to a premium.

In opposition to the Mc3 numbers, Summary Scan, a division of the Advertising Checking Bureau (ACB), shows 1988 as a strong year, with 252.7 billion coupons distributed, a 14.6% jump over 1987, which compares with a 6% growth from the same source in 1987. Summary Scan director Kermit Meyers saw 1988's lower "irresistible" space rates and the increased use of multiple coupons in one ad as key factors in couponing's greater growth in 1988.

Both reports agree that newspaper free-standing inserts (FSIs) continue to dominate the coupon business: Mc3 says FSIs accounted for 77% of all coupons, while Summary Scan shows FSIs with 88%.

Early in 1989, editorials in some trade publications (though not *Decisions*) that suggested FSIs may have hit their peak created a stir in the promotion community. Obviously many people disagreed, especially the management of the two major FSI companies, News America (Quad & Product Movers) and Valassis. They see business as strong as ever, if not stronger, considering there are fewer dates of scheduled national FSIs in 1989 than there were in 1988.

The bottom line is that there were more pages in the three FSIs in the first quarter of '89 than in the same period in 1988. Once more, since the average cost of a page is up in '89 over '88 and '87, total revenues are up.

In fact, there is a feeling among some advertisers that, with most packaged-goods companies placing 70%-80% of their coupons in FSIs, they probably should be looking for some logical alternatives. It has been generally recognized that direct mail offers the best challenge to FSIs' mass reach, color and the potential return.

One attempted move to capitalize on this perception, Metromail's "Red Letter Day" mass co-op mailing program, failed to meet or beat the efficiency of FSIs and went out of business in the spring of 1989, despite the deep pockets of new owner R.R. Donnelley (a printer). New co-op direct-mail programs from ActMedia and the mighty American Express company also had to be canceled for lack of participation.

But three direct-mail companies have shown their strength by surviving the storms of '88 and continuing with co-op mailings in 1989 and plans for 1990. Donnelley's Carol Wright co-op will run ten times in 1989/90 to 30-40 million households. Larry Tucker's Supermarket of Savings will run three times in the year to different demographic segments, such as households with new babies and households with at least one member aged 50-65. Select & Save Plus has expanded its co-op with several selective options to 15 million circulation three times a year.

Gannett developed a four-color newspaper network in 1988 and began to sell 25-30 million circulation in two versions: one, a simple opportunity for one advertiser to buy the network for promotional or regular advertising; and two, a co-op couponing page that competed with FSIs. The former is moving ahead successfully. The latter has been dropped by Gannett. The major reasons for failure were high costs and several missing major cities in the package.

At Rupert Murdoch's News America Corp., Product Movers and *TV Guide* have teamed up to sell coupons in the back section of *TV Guide*, and the first issues have attracted some major players. But magazines in the past have not redeemed very well and for now the jury is still out.

Coupons also continue to show up in-store, with Act Media's national "Act Now" program and Catalina Marketing's "Coupon Solutions" front-end couponing, which has expanded to 15 major U.S. markets and 18 supermarket chains. A new entry in 1989 is "The Savings Spot," a computerized couponing display that is currently in test in Kroger and Cub Foods in Atlanta. ■

TV's CONTENT CONTROVERSY

WHAT THEY SAY

Thus far, discussion of television program content has largely been characterized by contentiousness and partisanship. Indeed, while many of those involved claim to speak on behalf of that elusive American constituency, the "Silent Majority," little empirical evidence of what viewers themselves think has been brought to the debate.

We at the research firm of Oxtoby-Smith recently conducted a survey among a national probability sample of 500 adults in order to determine their attitudes towards objectionable tv programing. Our objective was to provide a dispassionate forum for the voice of the viewing public.

Viewers' comments revealed an acute, pervasive distress at the content of some tv programing, a circumstance made more ominous by their willingness to support sweeping and restrictive corrective measures.

Those offended by what is shown on television are very much the mainstream. Fully half (49%) of all viewers reported being deeply bothered by the amount of objectionable material on television, while a similar number (55%) said specific measures should be taken to change the current state of programing content.

The survey found broad support (68%) for companies that withdrew their advertising from shows viewers regard as objectionable. Moreover, an equally high proportion (72%) expressed approval for consumer boycotts of companies that do not withdraw their ads from such shows.

One third (36%) of the sample felt that all such material should be taken off the airwaves, while 68% said that objectionable shows should, at the very least, be restricted to late-night viewing hours. Perhaps most ominously, 25% of all viewers thought the government should ban such material altogether by making it illegal.

Initial reports of the survey's results have apparently caused a good deal of distress among broadcasters, advertisers and those who see in the findings a threat to the right of free speech. That response apparently also reflects the fear that these data provide ammunition for those who wish to censor the public airwaves according to their particular parochial interests. Finally, it reflects concern at the public's failure to perceive the seriousness of that threat, and, indeed, at the willingness by a disturbingly large proportion of them to embrace those censorious views.

That response is, in our judgment, an exaggerated and distorted interpretation of what viewers have said. What is being expressed is not an intolerance of programing that is challenging or provocative or "controversial," but a rejection of a prurience perceived to be both gratuitous and pervasive.

Moreover, viewers seem to be giving voice not only to their anger at programing content per se, but to an attendant sense of frustration that those who currently control television programing are not acting responsibly. To fail to recognize that state of affairs is ultimately futile. The refusal to acknowledge unwelcome news does not make it go away.

More properly, what these findings urge is that the advertising and broadcasting communities become more sensitive to the legitimate — if disturbing — concerns of the viewing public. They urge, as well, further objective research into how viewers really feel.

David Smith is vice president of Oxtoby-Smith Inc., New York.

OUR READERS TELL US...

Our poll of agency buyers, conducted by Research USA, Chicago, shows many clients have pulled spots from controversial shows, with the agency's support. (Base = 138, unless otherwise indicated.)

1. Does your agency monitor program content for your clients?

Yes	81.9%
No	18.1%

2. Have any of your agency's clients withdrawn support from a show because of content?

Yes	70.0%
No	29.0%

a. If "Yes," do you support their decisions? Base: 98

Yes	82.7%
No	14.3%

3. Does your agency monitor cable as well as broadcast?

Yes	55.8%
No	43.5%
No answer	0.7%

4. Should networks ask producers to tone down the content of programs because of viewer/advertiser complaints?

Yes	38.4%
No	59.4%
No answer	2.2%

5. Would you suggest that a client remain in a controversial program if the cost of a spot were lowered?

Yes	18.1%

POLL

WHAT THEY'LL LIVE WITH

The "consumer revolt" against controversial television programing, along with the questions that we were receiving from our clients, prompted us to conduct a market research study to get a better sense of the scope of the issue. Is this really a grassroots consumer issue or is it simply one more attempt by a vocal few seeking to apply their own rigid definitions of what is appropriate for American viewing?

We interviewed 2,000 American adults in a sample that was balanced to be representative of the country. We were concerned that if we asked them in general terms whether they approve or disapprove of what's on tv and advertiser responsibility, we'd run the risk of obtaining responses that were "socially acceptable." So we instead asked people to focus on specific shows and whether they personally liked that particular show; didn't like it, but felt others should be allowed to choose whether or not to watch it; felt it should be taken off the air; and/or would refuse to buy the products that advertise on the show. We asked about shows in three categories: hosted audience participation talk shows, sitcoms and newsweeklies. In each category, we focused on shows that have been the target of criticism. (The one possible exception was *Roseanne*, which was included as a "control" sitcom to compare against the more notorious *Married . . . With Children*.)

We learned that while Americans are divided in their affection for controversial programs, clear majorities support their neighbors' rights to see them. Moreover, only a tiny minority seem ready to retaliate against companies that advertise on these programs.

Of the programs included in our survey, *Morton Downey Jr.* (since canceled) was the most disliked, and the one that most Americans said would make them want to boycott sponsors' products. For this show, while only 13% said they liked the show, only 4% said that they would not buy products that advertise on the show. This "would not buy" score was the highest we found. The rest of the shows covered were rated as boycott candidates by between 1% and 3% of respondents.

The only shows that more than 10% of respondents felt should be taken off the air were *Morton Downey Jr.* and *Geraldo*. No other show received such disapproval ratings among more than 6% of the sample.

For all shows that we asked about, the largest single response was "I don't know enough about this show to rate it" (between 35% and 56% of respondents said this about any particular show).

Generally, Americans seem to hold some combination of laissez faire and First Amendment allegiance. Overwhelmingly, those who were familiar enough with each program to comment, but who didn't like the show personally, said they felt others should be allowed to make their own choice.

We also looked for patterns of disapproval and activist sentiments among demographic subgroups. The only strong, consistent pattern we found was based on age: Older Americans are more likely to object to controversial programs. However, this group is especially unlikely to vent its displeasure against advertisers, overwhelmingly rejecting calls to boycott products advertised on the programs.

Of importance to advertisers, no group appeared particularly ready to take up the cause of cleaning up television by boycotting products. Americans seem to prefer registering their likes and dislikes with their channel changers more than with the checkbooks.

Clearly, no matter how small the percentages, there remains some risk in advertising on controversial programs, whether the programing be "trash tv" or highly charged "issue" programing like *Roe vs. Wade*. On the other hand, the audience and pricing reasons for choosing that show may outweigh the risk, particularly given that the risk appears to be relatively small. And further, even if you believe that television time is a commodity and that you can just as easily substitute a controversial show with a noncontroversial one, there is something to be said for not bowing to a small, vocal minority that, clearly, does not represent the will of the American people.

No	76.1%
"Depends"/No answer	5.8%

6. Do you think there are any positive aspects to remaining with a controversial show despite viewer complaints?

Base: 92	
Yes	66.7%
No	30.4%
No answer	2.9%
If "yes," why?:	
Higher ratings	31.5%
If it reaches target audience	15.2%
Shows pressure groups that advertiser will not be intimidated	12.0%
Shows commitment to serious issues	8.7%
People who support show will support advertisers	7.6%
Lower costs	6.5%
Other	13.1%
No answer	5.4%

Jeri Moore is senior vice president/director of Marketing Decision Systems for DDB Needham, Chicago.

ECONOMIC EYE

ISN'T THAT SPECIAL

Though the vault was empty and critics scoffed at its execution, *The Mystery of Al Capone's Vaults* is still the most watched syndicated special of all time, according to Nielsen. Six *Solid Gold* specials also rank among the top 25 of the last 16 years.

MAGAZINE AD SCORECARD

	Ad Pages July 1989	% change from July 1988	Dollars spent (000)	% change from 1988
1. Skin care, Creams, Lotions and Oils	138.28	68.3	5,463.7	95.1
2. Lip and Eye Beauty Products	45.98	-27.5	1,857.4	-32.5
3. Scents and Fragrances	44.21	96.2	1,633.8	172.1
4. Facial Makeup Products	13.33	-51.2	369.1	-61.3
5. Prepared Dinners and Entrees (including pizzas)	28.08	72.9	1,493.3	72.3
6. Liquor	343.85	23.6	15,709.6	25.1
7. Cigarettes	587.89	15.4	35,092.8	23.1
8. Soaps and Detergents	48.55	25.0	3,479.3	69.1
9. Passenger Cars, Domestic	272.67	4.2	15,113.4	10.6
10. Passenger Cars, Imported	451.25	-2.4	24,960.7	5.7

Source: Publishers Information Bureau as prepared by Leading National Advertisers.

MEDIA COST INDEX

1985 = 100 ← 1988 → ← 1989 →

	Oct.	% change	Nov.	% change	Dec.	% change	Jan.	% change	Feb.	% change	March	% change	Apr.	% change	May	% change
Network TV																
Daytime	82	-16	80	-14	73	-10	77	-17	68	-15	68	-15	72	-7	67	-12
Nighttime	114	-9	113	-2	109	-2	122	+8	120	-19	125	+11	112	+13	127	+16
Spot TV																
Prime time	128	+6	104	+3	129	+5	141	+10	127	-2	125	-4	131	+5	126	+0.3
Daytime	106	-5	102	-10	99	-6	116	-5	120	+11	97	-1	100	+5	101	-1
Network radio	131	+8	125	+10	119	+12	158	+8	142	+10	139	+15	128	+10	131	+13
Spot radio	-	-	-	-	110	-3	-	-	-	-	118	+12	-	-	-	-
Consumer magazines	115	+5	118	+6	119	+6	122	+6	122	+6	122	+6	122	+6	122	+6
Natl. Sunday magazines	130	+10	130	+10	130	+10	129	+10	129	+10	129	+10	129	+10	130	+12
Business publications	118	+5	120	+6	120	+7	119	+2	119	+2	119	+2	119	+2	123	+6
Newspapers	124	+7	124	+7	124	+7	131	+5	131	+6	131	+6	132	+6	131	+6
Outdoor	137	+11	137	+11	137	+11	137	+11	137	+11	132	+8	132	+8	132	+8

Notes: Percentage shown is relative change from the same month/period the year before.
*Revised

Sources:

Nighttime Network TV- Cost per average 30-second spot, 7:30-11 p.m. Monday-Saturday and 7-11 p.m. Sunday from Broadcast Advertisers Reports' (BAR) Network TV Service.

Daytime Network TV- Cost per average 30-second spot, 10 a.m.-4:30 p.m. Monday-Friday from BAR's Network TV Service.

Network Radio- Cost per average 30-second radio announcement from BAR's Network Radio Service.

Consumer Magazines estimate based on reported SRDS cost of a page, four-color in 40 national consumer magazines, as reported by Magazine Publishers Assn.

National Sunday Mags estimate based on published (rate cards) costs of a page, four-color in the national entries.

Daily Newspapers estimate based on Newspaper Advertising Bureau report of SRDS costs per column inch of a sample of 784 newspapers weighted to represent the universe.

Outdoor Posters based on estimate prepared by Institute of Outdoor Advertising.

Spot Radio index represents cost of a 60-second spot in the top 100 markets from data supplied to Radio Expenditure Reports by major radio representatives.

Business Publications estimates based on reported SRDS cost of a page, four-color in 48 publications representing 42 business and professional classifications.